Pet Supplies in the U.S., 10th Edition

Description:

The U.S. market for pet supplies and pet care products has grown each of the last five years, but growth has not been smooth. Post-recession consumers remain cost conscious and concerned about pet product prices, even as they generally continue to increase their annual spending on pet products including higher-ticket fare. Consumers are looking to private labels to reduce costs, but are still enthusiastic about new premium products. These apparently conflicting trends have contributed to the pet supply market's wobbly momentum. Fortunately, current trends hint that the market is stabilizing into a pattern of steady, moderate growth.

Packaged Facts' 10th edition of Pet Supplies in the U.S. compiles extensive and proprietary survey data on pet product trends, consumers, and pets, and carefully examines key factors influencing market growth. All pet types are considered, including cats and dogs as well as birds, small animals, fish, and reptiles. The report covers all major nonfood pet product categories including cat litter, rawhide/natural chews, other dog/cat supplies, and non-dog/cat supplies. Within these categories, major segments examined include cat litter, flea and tick care, toys, bedding, grooming, clean-up, and many others. The report sets 2014 as its base year, with historic market data provided for 2010 through 2014 and projected market valuations for 2015 through 2019. Market values are broken out by animal type, retail channel, and product category, as well as for mass-market and specialty channels including the natural supermarket channel and the specialty/gourmet supermarket channel.

Key drivers and trends reviewed include the still-building economy with an analysis of pet owners' current and anticipated future financial situations and preferences, the ongoing premiumization trend, the drive toward more natural pet products, which is now gaining momentum even outside of pet food categories, and pet ownership and population trends. The report also reviews marketer trends including detailed mass-market share breakouts, mergers and acquisitions, and category leaders. Advertising and new product trends are considered, along with retail channel and consumer trends including pet owner demographics, purchasing statistics by product type, and consumer attitudes about pet products and ownership based on the pet owner surveys.

Report Methodology

The information contained in this report was obtained from primary and secondary research. Primary research includes national online consumer polls of U.S. adult pet owners (age 18+) conducted on an ongoing basis by Packaged Facts, to measure purchasing patterns and attitudes with regard to pet products and services. With a sample size of approximately 2,000, these surveys are based on national online research panels that are census representative on the primary demographic measures of age, gender, geographic region, race/ethnicity, and household income. Other primary research includes select interviews with pet market experts; participation in pet industry events including the American Pet Products Association's Global Pet Expos (through 2015), and on-site examination of retail and service provider venues, as well as internet presence of pet products manufacturers, distributors, and retailers.

Secondary research includes information- and data-gathering from consumer business and trade publications including Pet Age, Pet Business, Pet Product News International, Petfood Industry, and Veterinary Practice News; company profiles in trade and consumer publications; and information culled from Packaged Facts' extensive pet market research database and report collection.

Our estimates of market size and company performance are based on reported revenues of pet product manufacturers, retailers, and pet services providers; IRI's multi-outlet (MULO) data, which tracks sales in supermarkets, drugstores, mass merchandisers (including Walmart), and wholesale clubs; surveys of independent and chain pet store retailers; government data including U.S. Bureau of Labor Statistics Consumer Expenditure Surveys; and figures from other market research sources. Trends analysis also relies on cross-tabulations of data compiled by Experian Simmons, New York, NY.
Regulatory Agencies and Trends
Report Methodology
Market Composition and Size
Wobbly Momentum in Total Retail Sales
Table 2-1 U.S. Retail Sales of Pet Supplies, 2010-2014 (in millions of dollars)
Market Share by Animal Type
Figure 2-1 Share of U.S. Retail Sales of Pet Supplies by Animal Type, 2014 (percent)
Table 2-2 U.S. Retail Dollars Sales of Pet Supplies by Animal Type, 2014 ($ in millions)
Cat Litter Is Top Segment
Table 2-3 U.S. Retail Sales and Shares of Dog and Cat Supplies: By Segment, 2014 (in millions of dollars)
Market Share by Retail Channel
Table 2-4 Share of U.S. Retail Sales of Pet Supplies by Retail Channel, 2014 (percent)
Figure 2-2 U.S. Retail Dollar Sales of Pet Supplies by Retail Channel, 2014 ($ in millions)
IRI Tracked Sales Reach $4.99 Billion
Figure 2-3 IRI-Tracked Dollar Sales of Pet Supplies by Category for the 12 Months Ending in June 2014 and June 2015 ($ in millions)
Figure 2-4 Share of IRI-Tracked Sales of Pet Supplies by Category for the 12 Months Ending in June 2014 and June 2015 (percent)
Table 2-5 IRI-Tracked Sales of Pet Supplies by Category for the 12 Months Ending in June 2015 vs. June 2014 ($ and units in millions)
Cat Litter: Lightweight Litter Leap Drives Sales
Figure 2-5 IRI-Tracked Sales of Cat Litter for the 12 Months Ending in June 2014 and June 2015 ($ and units in millions)
Figure 2-6 Share of IRI-Tracked Sales of Cat Litter by Product Type for the 12 Months Ending in June 2014 and June 2015: Conventional, Lightweight, Natural (percent)
Rawhide/Natural Chews Edge Up
Figure 2-7 IRI-Tracked Sales of Rawhide/Natural Chews for the 12 Months Ending in June 2014 and June 2015 ($ and units in millions)
Other Dog/Cat Supplies
Figure 2-8 IRI-Tracked Sales of Other Dog/Cat Supplies for the 12 Months Ending in June 2014 and June 2015 ($ and units in millions)
Non-Dog/Cat Supplies
Figure 2-9 IRI-Tracked Sales of Non-Dog/Cat Supplies Sales for the 12 Months Ending in June 2014 and June 2015 ($ and units in millions)
Natural Supermarket Channel Pet Product Performance
Table 2-6 Retail Dollar Sales of Pet Products in the Natural Supermarket Channel by Category and Segment, 2013 vs. 2014 (in millions of dollars)
Pet Product Performance in the Specialty/Gourmet Supermarket Channel
Table 2-7 Retail Dollar Sales of Pet Products in Specialty/Gourmet Supermarket Channel by Category, 2013 vs. 2014 ($ Millions)
Pet Market Drivers and Macrotrends
Market in Perspective
Table 2-8 Retail Dollar Sales and Percentage Share of U.S. Pet Market by Category, 2013 vs. 2014 ($ in billions)
Figure 2-10 Market Share of U.S. Pet Market by Category, 2010-2014 (percent)
Economy Still a Factor in Pet Spending
Table 2-9 Pet Owners: Overview by Change in Financial Situation Compared with 12 Months Ago, 2011-2014 (U.S. pet-owning households)
Table 2-10 Pet Owners: Overview by Expectations for Personal Financial Situation Over the Next 12 Months, 2011-2014 (U.S. pet-owning households)
Table 2-11 Level of Agreement with Statement: “I am spending less on pet products because of the economy,” 2010-2015 (percent)
Figure 2-11 Level of Agreement with Statement: “I am spending more on pet products than I used to,” 2015 (percent)
Savings Still Important
Table 2-12 Level of Agreement with Statement: “Many pet products are becoming too expensive,” 2011-2015 (percent)
Figure 2-12 Level of Agreement with Statement: “I look out for lower prices, special offers, and sales on pet products,” 2015 (percent)
Premiumization and Natural
Pet Ownership and Population Trends
Baby Boomers a Key to Market Growth
Projected Market Growth
Sales to Near $17 Billion in 2019
Figure 2-13 Projected U.S. Retail Sales of Pet Supplies, 2014-2019 ($ in millions)
Figure 2-14 Projected Growth Rate of U.S. Retail Sales of Pet Supplies, 2014-2019 (percent)
Chapter 3: The Marketers
Competitive Overview
Marketers: Number and Types
Pet Supply Market Leaders
Central Garden & Pet
Table 3-1 Central Garden & Pet Brands
Hartz Mountain (Unicharm/Sumitomo)
Table 3-2 Hartz Pet Product Lines
Rolf C. Hagen
Table 3-3 Rolf C. Hagen Brands and Products
Petmate (Doskocil Manufacturing Co., Inc.)
Table 3-4 Petmate Brands and Products
Perrigo (Sergeant's Pet Care Products, Velcera)
Table 3-5 Perrigo Brands and Products
Spectrum Brands (United Pet Group)
Table 3-6 Spectrum Brands’ Pet Lines and Pet Products
Second-Tier Pet Marketers
Marketer Acquisitions and Mergers in the Second-Tier and Beyond
Category Leaders
Cat Litter
Crate, Carriers, and Pet Shelters
Potty, Clean-Up, and Odor-Control Products
Collars and Leads
Dog Chews
Flea/Tick-Control Products
Grooming Products
Toys
Non-Dog/Cat Supplies
Key Trends
Private-Label Gains and Losses
Figure 3-1 Private-Label Share of IRI-Tracked Sales of Pet Supplies by Category, Years Ending June 2014 and June 2015 (percent)
Premiumization Trends
Innovation by Entrepreneurship—And Crossover
Channel Expansion and Exclusivity
Marketer and Brand Shares
Methodology
Nestlé Purina Remains Top Dog in Pet Supplies Overall
Figure 3-2 Marketer Shares of Pet Supplies Sales in IRI-Tracked Outlets, 2015 (percent)
Lightweight Now Heavyweight in Litter Category
Figure 3-3 Marketer Shares of Cat Litter Sales in IRI-Tracked Outlets, 2014 vs. 2015 (percent)
Table 3-7 IRI-Tracked Sales of Cat Litter by Marketer and Brand, 2014 vs. 2015 (millions of dollars and percent)
8 in 1 (Spectrum Brands) Leads in Rawhide/Natural Chews
Figure 3-4 Marketer Shares of Rawhide/Natural Chews Sales in IRI-Tracked Outlets, 2014 vs. 2015 (percent)
Table 3-8 IRI-Tracked Sales of Rawhide/Natural Chews by Marketer and Brand, 2014 vs. 2015 (millions of dollars and percent)
Hartz Mountain Strengthens Its Dog and Cat Products Position
Figure 3-5 Marketer Shares of Other Dog/Cat Supplies Sales in IRI-Tracked Outlets, 2014 vs. 2015 (percent)
Table 3-9 IRI-Tracked Sales of Other Dog/Cat Supplies by Marketer and Brand, 2014 vs. 2015 (millions of dollars and percent)
Spectrum Holds First, Central Garden Edges Out Healthy Pet for Second Place in Non-Dog and Cat Category
Figure 3-6 Marketer Shares of Non-Dog/Cat Supplies Sales in IRI-Tracked Outlets, 2014 vs. 2015 (percent)
Table 3-10 IRI-Tracked Sales of Non-Dog and Cat Products by Marketer and Brand, 2014 vs. 2015 (millions of dollars and percent)
Chapter 4: Marketing and New Product Trends
Advertising Trends
Figure 4-1: PetSmart Advertising Budget, 2009-2014
Vendor Allowances: Cheaper than Full-Blown Ad Campaign, Still Effective
Social Media
Illustration 4-1: Petco's Facebook Page, with Clip from Current Ad Campaign, and “Shop Now” Button on Timeline Cover Page

Advertising Trends and Categories

On Deck: Pet Ownership?

Cause Marketing

Illustration 4-2: Blue Buffalo Pet Cancer Awareness Campaign, in Partnership with Petco

Illustration 4-3: PetHub Kiss Me I'm Rescued Campaign Facebook Cover Page

Table 4-1 Level of Agreement with Statement: “The participation by pet product retailers in pet welfare and rescue causes and events plays a significant role in where I buy pet products,” 2014 vs. 2015 (percent)

Table 4-2 Level of Agreement with Statement: “The participation by pet product brands in pet welfare and rescue causes and events plays a significant role in which brands I buy,” 2014 vs. 2015 (percent)

Table 4-3 Agreement with Statement: “I have contributed time or money to pet welfare or rescue causes” (percent)

Companions

Illustration 4-4: Petco Companions Ad Campaign

From Pet Parents to Pethood

Illustration 4-5: PetSmart Pethood Banner

Illustration 4-6: Planned Pethood International Facebook Page

Strategic Photobomb

Illustration 4-7: Dallas Pets Alive!'s Photobomb of Ellen DeGeneres' Oscar Selfie

Other Marketers Celebrate Human/Animal Bond

New Product Categories and Trends

Pet Safety

Illustration 4-8: Free Upon Request: ASPCA “Animals Inside!” Window Tag and Poison Control Refrigerator Magnet

Illustration 4-9: Center for Pet Safety's Video Clip of Failed IMMI PetBuckle Safety Harness Restraint System: Restraint Broke During Testing: Clear Fail

Illustration 4-10: Vario Cage Single, Large, and Vario Cage Splashless Water Bowl

Illustration 4-11: Kurgo Tru-Fit Smart Harness with Camera Mount

Convenience and Automation

Illustration 4-12: Litter Robot's LRII, Automatic Self-Cleaning Litter Box, Available in Beige, Black, or Grey

Illustration 4-13: Neptune Systems AquaController Apex Automatic Feeding System (AFS) for Reefs and Aquaria

Toys and Fun

iFetch Plans New Release

Illustration 4-14: The iFetch Too, Early Announcement Page

Do It Yourself

Illustration 4-15: Bulk Toy Parts Order Page at ChinchillaCity.com

Illustration 4-16: Friskies DIY Instructions for Cat Toys

Cats Love Lasers

Illustration 4-17: FroliCat BOLT Automated Laser Cat Toy

Toys for... Fish?

Illustration 4-18: Floating Betta Log by Zoo Med Senior/Special Needs Senior Retailers Online

Illustration 4-19: SeniorPetProducts.Com Splash Page

Mobility

Illustration 4-20: Hold'Em Up's U-Band Hip Lift

Illustration 4-21: Rabbit Wheelchair Custom Built by Eddie's Wheels

Stairs and Ramps

Illustration 4-22: The Paws Aboard Boat Ladder for Dogs, by Skamper-Ramp

Senior Toys

Illustration 4-23: Left: Kong Senior, Made of Specially Senior-Formulated Plastic To Be Easy on Aging Teeth; Right: Orbee-Tuff Old Soul Dog Bones, Also Specially Formulated for Senior Dogs

Illustration 4-24: Grippers Non-Skid Dog Socks, by Dog Quality Specialty and Orthopedic Beds

Illustration 4-25: Sealy Large Cooling Memory Foam Mattress

Birds, Rodents, and Other Senior Animals

Illustration 4-26: Nekton Medium Bird Vitamin and Supplement Kit

Cat Litter Innovation

Illustration 4-27: Tidy Cats “Toss Me That Litter” Ad Spot Clip

Flea and Tick Further Diversifies Into Chewables

Illustration 4-28: Bravecto Chewables (Merck)
Other New Products
Illustration 4-29: HenSaver's Hen Holster
Chapter 5: Retail Channel Trends
Retailers Vying for Pet Supply Market Share
Illustration 5-1: Pet Products Sections in Dollar Tree (left) and CVS Pharmacy (right).
Illustration 5-2: Dog Chews at Pike Nurseries in Lake Oconee, GA
Petco Steps Up Unleashed Stores
Illustration 5-3: Unleashed by Petco in San Jose, CA; Keller, TX; and the Washington, D.C. metro area.
Figure 5-1: Number of Unleashed by Petco Stores, 2009-2015
Walmart Quietly Inching Toward “Pets as People”
Illustration 5-4: Walmart’s Pet Website Banner Encourages Pet Owners to “Prepare your pets for Easter,” Recognizing Pets’ Growing Status in Many American Households
PetSmart Continues to Expand Channel Exclusives
Illustration 5-5: ONLY at PetSmart Brands
Petco IPO
Petco Acquisitions
Illustration 5-6: Petco Splash Page with Doctors Foster & Smith Inset/Link .. 147
PetSmart Acquisitions
PetSmart Goes Private: Who’s Next?
Retailers Draw Customers (and Party Animals) with New Services
Pet Parties
Illustration 5-7: Pet Birthday Party (photo courtesy of the Doggie Bag Café)
Online and Omni-Channel
Pet Retailers Stepping onto Veterinarian Turf
Illustration 5-8: Left: Vaccination Clinic Announcement in Front of Tractor Supply Company; Right: Vaccination Cooler at Tractor Supply Company
Veterinarians Taking on More Pet Supplies
Figure 5-2: Pet Owner Response to the Statement, “I have taken my dog(s) to the vet for a routine checkup within the last 12 months.”
Figure 5-3: Pet Owner Response to the Statement, “I have taken my cat(s) to the vet for a routine checkup within the last 12 months.”
Figure 5-4: Pet Owner Response to the Statement, “I am taking my dog(s) [or cat(s)] to the vet less often these days because of the economy.”
Illustration 5-9: New upscale veterinary hospitals offer an extensive array of services—and pet supplies.
Good Causes Build Good Customers
Figure 5-5: Pet Owner Response to the Statement, “The participation by pet product retailers/pet product brands in pet welfare and rescue causes and events plays a significant role in where I buy pet products.”
Deal-Seeking Continues
Figure 5-6: Pet Owner Response to the Statement, “I look out for lower prices, special offers, and sales on pet products”
Coupon Use Fairly Steady
Figure 5-7: Pet Owner Responses to the Statement, “Because of a coupon, I would be drawn to a store that I don’t normally shop at”
31% of Consumers Still Economy-Constrained
Figure 5-8: Pet Owner Responses to the Statement, “I am spending less on pet products these days because of the economy”
But Half Are Spending More Than They Used To
Figure 5-9: Pet Owner Responses to the Statement, “I am spending more on pet products than I used to”
Retail Channel Trends
Figure 5-10: Household Purchasing Rates for Pet Food and Supplies by Retail Channel: Dog and Cat Owners (percent)
Figure 5-11: Household Purchasing Rates for Pet Food and Supplies by Retail Channel: Fish, Birds, and Reptile Owners (percent)
Figure 5-12: Household Purchasing Rates for Pet Food and Supplies by Retail Channel: Rabbit, Hamster, and Other Pet Owners (percent)
Table 5-1 Household Purchasing Rates for Pet Food and Supplies by Retail Channel: Dog, Cat, Fish, and Bird Owners (number of U.S. households)
Table 5-2 Household Purchasing Overview for Pet Food and Supplies by Retail Channel: Reptile, Rabbit, Hamster, and Other Pet Owners (number of U.S. households)
Shopping in Pet Specialty Chains
Table 5-3: Usage Rates for Pet Specialty Chains, 2015 (percent of pet product shoppers)
Internet Is a Main Retail Channel for 10% of Pet Product Buying Households
Table 5-4: Number and Percent of U.S. Households That Purchase Pet Food or Supplies Online, 2010-2015
Figure 5-13: Rates of Agreement/Disagreement with Statement, “I am buying pet products online more than I used to,” 2015
Online Share of Pet Product Expenditures
Table 5-5: Pet Owner Estimates of Online Share of Pet Product Expenditures: By Product Classification, 2015
Top Websites for Pet Product Sales
Table 5-6: Leading Websites for Pet Product Purchases Within the Last Three Months: By Product Type, 2015 (percent of online buyers in pet product category)
1800PetMeds Leads in Online Sales of Rx
Table 5-7 Leading Websites for Pet Product Purchases Within the Last Three Months: Prescription vs. Over-the-Counter Pet Medications, 2015 (percent of online buyers of pet medications)
Figure 5-14: Leading Websites for Pet Product Purchases Within the Last Three Months: Other Pet Supplies, 2015 (percent of online buyers of other pet supplies)
Chapter 6: The Consumer
Pet Ownership Trends
Data Sources
55% of U.S. Households Own Pets
Table 6-1 Household Ownership Rates for Selected Pet-Owning Classifications, 2007-2015 (percent and number of U.S. households)
Topline Purchasing Rates for Key Dog and Cat Supply Categories
Table 6-2 Household Purchasing Overview for Dog or Cat Supplies by Top Categories, 2015 (percent and number of U.S. dog- or cat-owning households)
Table 6-3 Household Purchasing Rates for Dog or Cat Supplies by Top Categories, 2007-2015 (percent and number of U.S. dog- or cat-owning households)
Annual Purchasing Rates for Other Pet Supply Classifications
Table 6-4 Annual Purchasing Rates for Other Dog or Cat Supply Product Types, 2015 (percent and number of U.S. dog- or cat-owning households)
Consumer Focus: Flea and Tick Products
Flea/Tick Care Usage Notches Up
Table 6-5 Household Purchasing of Flea and Tick Care Products for Dogs or Cats by Purpose of Use, 2012-2015 (percent of U.S. dog- or cat-owning households)
Table 6-6 Household Purchasing of Flea and Tick Care Products for Dogs or Cats by Purpose of Use: Dog-Only vs. Cat-Only Households, 2015 (percent)
Flea/Tick Pills Gain Popularity
Table 6-7 Household Purchasing of Flea and Tick Care Products for Dogs or Cats by Type, 2012-2014 (percent of U.S. dog- or cat-owning households)
Slight Dent in Topical/Spot-On Brand Usage Rates
Table 6-8 Household Purchasing of Flea and Tick Care for Dogs or Cats by Product Type, 2013-2014 (percent and number of U.S. dog- or cat-owning households)
Flea and Tick Care Purchasing Demographics
Table 6-9 Purchasing Patterns for Flea and Tick Care for Dogs or Cats by Age Cohort: By Product Type, 2015 (U.S. dog- or cat-owning households)
Table 6-10 Purchasing Patterns for Flea and Tick Care Products for Dogs or Cats by Race/Ethnicity: By Product Type, 2014 (U.S. dog- or cat-owning households)
Table 6-11 Purchasing Patterns for Flea and Tick Care for Dogs or Cats by Region: By Product Type, 2014 (U.S. dog- or cat-owning households)
Table 6-12 Purchasing Patterns for Flea and Tick Care for Dogs or Cats by Household Income: By Product Type, 2014 (U.S. dog- or cat-owning households)
Consumer Focus: Heartworm Treatment and Prevention
Purchasing Rates for Heartworm Treatment and Prevention
Table 6-13 Household Purchasing of Heartworm Treatment/Prevention for Dogs or Cats, 2007-2015 (percent and number of U.S. dog- or cat-owning households)
Heartworm Treatment/Prevention Purchasing Demographics
Table 6-14 Purchasing Patterns for Heartworm Treatment/Prevention for Dogs or Cats by Age Cohort, 2014 (U.S. dog- or cat-owning households)
Table 6-15 Purchasing Patterns for Heartworm Treatment/Prevention for Dogs or Cats by Race/Ethnicity, 2014 (percent of U.S. dog- or cat-owning households)
Table 6-16 Purchasing Patterns for Heartworm Treatment/Prevention for Dogs or Cats by Region, 2014 (U.S. dog- or cat-owning households)
Table 6-17 Purchasing Patterns for Heartworm Treatment/Prevention for Dogs or Cats by Household Income, 2014 (U.S. dog- or cat-owning households)
Consumer Focus: Dog and Cat Supplements
19 Million Households Buy Nutritional Supplements for Dogs or Cats
Table 6-18 Household Purchasing of Nutritional Supplements for Dogs or Cats, 2007-2015 (percent and number of U.S. dog- or cat-owning households)
Table 6-19 Household Purchasing of Nutritional Supplements for Dogs or Cats: Dog-Only vs. Cat-Only Households, 2015 (percent)
At Least Once per Day
Table 6-20 Frequency of Administration of Dog or Cat Supplements, 2015 (percent of pet supplement purchasers)
Preference for “Made in USA” Pet Supplements Edges Out “Organic”
Table 6-21 Level of Agreement with Statement: “I prefer pet supplements and vitamins that are natural/organic, or made in the USA” (percent of pet supplement purchasers)
Veterinarians Strongly Influence Pet Supplement Purchases
Table 6-22 Level of Agreement with Statement: “I buy pet supplements that my veterinarian recommends” (percent of pet supplement purchasers)
Preference for Human Brands
Table 6-23 Level of Agreement with Statement: “I buy pet supplements under the same human brand names that I am familiar with, such as GNC” (percent of pet supplement users)
Pet Supplement Purchases Fragmented by Brand
Table 6-24 Leading Pet Supplements by Brand, 2015 (percent of pet supplement users)
Targeted Pet Health Conditions: Joint, Skin/Coat, and Heart Health
Table 6-25 Level of Agreement with Statement: “I am currently giving my pet(s) vitamins or nutritional supplements for the following health conditions or concerns” (percent of pet supplement purchasers)
Pet Supplement Purchasing Demographics
Table 6-26 Purchasing Patterns for Pet Supplements for Dogs or Cats by Age Cohort, 2014 (U.S. pet-owning households)
Table 6-27 Purchasing Patterns for Pet Supplements for Dogs or Cats by Race/Ethnicity, 2014 (U.S. pet-owning households)
Table 6-28 Purchasing Patterns for Pet Supplements for Dogs or Cats by Region, 2014 (U.S. pet-owning households)
Table 6-29 Purchasing Patterns for Pet Supplements for Dogs or Cats by Household Income, 2014 (U.S. pet-owning households)
Consumer Focus: Cat Litter
80% Use Cat Filler/Litter
Table 6-30 Household Purchasing of Cat Box Filler/Litter by Litter Type, 2007-2015 (percent and number of U.S. cat-owning households)
Table 6-31 Household Purchasing of Cat Box Filler/Litter for Cats by Brand, 2008-2015 (number and percent of U.S. cat-owning households)
Table 6-32 Frequency of Litter Box Changes by Cat-Owned Households, 2012-2015 (percent of U.S. cat-owning households)
Cat Box Filler/Litter Purchasing Demographics
Table 6-33 Purchasing Patterns for Cat Box Filler/Litter by Age Cohort: By Product Type, 2014 (U.S. cat-owning households)
Table 6-34 Share of Purchasers of Cat Box Filler/Litter by Race/Ethnicity: By Product Type, 2014 (U.S. cat-owning households)
Table 6-35 Share of Purchasers of Cat Box Filler/Litter by Region: By Product Type, 2014 (U.S. cat-owning households)
Table 6-36 Share of Purchasers of Cat Box Filler/Litter by Household Income: By Product Type, 2014 (U.S. cat-owning households)
Consumer Focus: Toys, Collars, Grooming, and Other Pet Supplies
Table 6-37 Annual Purchasing Rates for Other Pet Supplies by Product Type, 2012-2014 (percent and number of U.S. dog- or cat-owning households)
Figure 6-1 Consumer Base for Dog or Cat Supplies by Category, 2015 (in millions of U.S. pet-owning households)
Table 6-38 Household Purchasing of Selected Pet Supplies by Product Type, 2013-2015 (percent and number of U.S. dog- or cat-owning households)
Other Pet Supplies Purchasing Demographics
Table 6-39 Purchasing Patterns for Selected Pet Supplies by Product Type: By Age Cohort, 2014 (U.S. dog- or cat-owning households)
Table 6-40 Purchasing Patterns for Selected Pet Supplies by Product Type: By Race/Ethnicity, 2014 (U.S. dog- or cat-owning households)
Table 6-41 Purchasing Patterns for Selected Pet Supplies by Product Type: By Region, 2014 (U.S. dog- or cat-owning households)
Table 6-42 Purchasing Patterns for Selected Pet Supplies by Product Type: By Household Income, 2014 (U.S. dog- or cat-owning households)

Table 6-43 Household Purchasing of Selected Pet Supplies by Product Type, 2012-2015 (number and percent of U.S. pet-owning households)

Figure 6-2 Household Purchasing of Selected Dog or Cat Supplies by Category, 2015 (number of U.S. pet-owning households)

Table 6-44 Household Purchasing of Selected Pet Supplies by Product Type, 2013-2015 (number and percent of U.S. dog- or cat-owning households)

More Pet Supplies Purchasing Demographics

Table 6-45 Purchasing Patterns for Selected Pet Supplies by Product Type: By Age Cohort, 2014 (U.S. pet-owning households)

Table 6-46 Purchasing Patterns for Selected Pet Supplies by Product Type: By Race/Ethnicity, 2014 (U.S. pet-owning households)

Table 6-47 Purchasing Patterns for Selected Pet Supplies by Product Type: By Region, 2014 (U.S. pet-owning households)

Table 6-48 Purchasing Patterns for Selected Pet Supplies by Product Type: By Household Income, 2014 (U.S. pet-owning households)

Ordering:

Order Online - [http://www.researchandmarkets.com/reports/3446371/](http://www.researchandmarkets.com/reports/3446371/)

Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Pet Supplies in the U.S., 10th Edition
Web Address: http://www.researchandmarkets.com/reports/3446371/
Office Code: SCH3HN5W

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Product Format</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) -</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single User:</td>
<td>□</td>
<td>USD 3995</td>
</tr>
<tr>
<td>Electronic (PDF) -</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enterprisewide:</td>
<td>□</td>
<td>USD 7990</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: Mr □ Mrs □ Dr □ Miss □ Ms □ Prof □
First Name: __________________________ Last Name: __________________________
Email Address: * ________________________________
Job Title: ________________________________
Organisation: ________________________________
Address: ______________________________________________________
City: __________________________________________
Postal / Zip Code: __________________________________________
Country: __________________________________________
Phone Number: __________________________________________
Fax Number: __________________________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:

Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: __________________________________________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World